SPS Business Rules

SCREEN   Filter

Question/Issue
AFRS Title
Business Rule Adopted

The budget_position_group will have a biennium for titles available. User will be able to set this biennium by position file. When they change the biennium for titles, the exception process must re-run to validate exception records.

Biennium for titles will be saved with the projection group so that the projection reports can look up titles from the appropriate biennia. The titles biennium does not affect the projection period.

Question/Issue
Filter
Business Rule Adopted

Filter criteria is saved for only the current session. Filter should be set to ALL by default when accessing the system in a new session.

Question/Issue
Filter display when no lower level
Business Rule Adopted

FILTER If no account codes exist in a level lower of the selected item, display "None Exists" in the selection box and disable for all affected items. (I.e., selected program 400 and no sub programs, activity, sub activity or task exists on each of the selection boxes for program 400 then disable the selection boxes with "None Exists" displayed in each.

Question/Issue
Index code usage
Business Rule Adopted

Do not store index definitions. Looks up definitions for reporting, filter, position list, and position detail. This will require users to have indexes defined in AFRS one day in advance of use.   Always use the latest (current) biennium titles when defining indexes. Also assumes that if they want to do anything at a high level of coding, they have an index that represents that high level coding (I.e., DOC PI 20000 = Program 200)

Question/Issue
Load of AFRS Title
Business Rule Adopted

One day delay in accessing AFRS coding titles is acceptable for the first release

SCREEN Filter

Question/Issue
Master Index Handling
Business Rule Adopted

2-4-03 Vicki - If we are not storing master index, I don't think we want to flag a record invalid because of something that came from there.
According to Nancy, AFRS always uses the master index value when a field has both a master index value and an manually entered value. So if we want to be consistent to AFRS we should store:

               10001 ABCD   0011   WXYZ

and not mark as a exception. Do we want to make this the requirement? 2-7-03 Art says yes!

Question/Issue
MTG 1.3.15
Business Rule Adopted

Provide filtering options to provide users will the capability to perform a position maintenance operation to a set or group of records

Question/Issue
MTG 2.1.2
Business Rule Adopted

Copy funding detail into a new file

Question/Issue
Name Length
Business Rule Adopted

The name field in SPS will be 30 characters

Question/Issue
Update Displayed Records
Business Rule Adopted

List of Filter/Update in 1 Transaction fields reviewed and updated.

SPS Business Rules

SCREEN   Add Position File

Question/Issue
Can a file owner be changed
Business Rule Adopted

Budget operations or a file owner may change the file owner of a position file to any authorized user of the SPS system (combo box of available users?)

Question/Issue
Owner of a file
Business Rule Adopted

Whoever creates a position file (position_group) will be the owner of that file. A field creation_login_id will be used to indicate the owner.

Question/Issue
Position File List Display
Business Rule Adopted

If user is Budget Operations - show all files (by default)
If user is Edit Access - show only files they own (by default)
In either case, the user can opt to see the full or partial list.

Question/Issue
Update date of a position file
Business Rule Adopted

The update login ID and date for a budget_position_group when any record within is changed or a record is added or a record is deleted.

SPS Business Rules

SCREEN   Update Position File

Question/Issue
Extract date to use for copy
Business Rule Adopted

When copying position files, copy extract date FROM --> TO when TO is empty.   Keep TO extract date when FROM extract date is the same. Blank out EXTRACT date when TO extract date is not equal to FROM extract date.

SPS Business Rules

SCREEN   HR Data Load

Question/Issue
Appropriation Index
Business Rule Adopted

2/20/03 - On the HR data load, we will replace the * with a 1 if the extract occurs in the first fiscal year or a 2 if the extract occurs in the 2nd fiscal year. SPS will not store * in the appropriation index.

Question/Issue
Funded Records
Business Rule Adopted

On a DOP import, all new recrds will be default to be flagged as funded.

Question/Issue
HRISD Load Exceptions
Business Rule Adopted

Job Class Table
If Range is 99, do not load the range, leave null

budget_position
If salary_range is 99, do not load range or step, leave null

Question/Issue
Job Classification Structure
Business Rule Adopted

When position records are state patrol, allow overwrite of Range to any Range available to state patrol positions with that job class. A separate table in SPS is available to look up these ranages.

Validate on load, validate on entry

SCREEN   HR Data Load

Question/Issue
Pay Range not equal to Job Class Rg

Business Rule Adopted

2/20/03 - if rate_exception_pay = Y, then we need to allow the user to enter the salary. Range and step are no longer valid. A future requirement will be to make the system smart enough to know when the pay caught up with the job class range/salary schedule and remove the Y rating…but that is future.

Ignore the appointment record salary range, the job class range rules. If the appointment record has a salary range, and the job class does not, the appointment salary range will be ignored and the appointment salary will be used.

Question/Issue
Person ID Number

Business Rule Adopted

Art and Vicki met 9-20-02 and decided that Person ID never needs to be available to the user. This will be used for database purpose only. It may create the situation where one person has multiple ID's but that is okay if the user is never relying on Person ID. Currently BPS1 operates in this way with SSN in the background only.

When a user adds a new position, the system should assign a person ID as a negative integer. The assignment can be sequential by agency. The first would be -00001, the next -00002 and so on. Or backward from -99999 would be fine as well.

Question/Issue
School for Deaf Salary

Business Rule Adopted

Team Discussion 1/24/03
Let's go ahead an nullify the salary_range school/teacher job classes. This will for SPS to use the actual salary and make it so we don't have to try to decipher the rules. This is not issue/requirement #134. Kent, you load range from the Job Class table when loading HR data positions, correct? If so this shouldn't affect the extract, otherwise we'd have to set these to null in import.

Question/Issue
Special pay

Business Rule Adopted

The special pay code will be replaced by a flag in the database indicating if the special pay range should be used or not. On the data load this flag will be set to 'Y' if the special pay code equals either AP or DL, and the appointment's salary_range is greater than the salary range for the job class. All other records will be set to 'N'.

SPS Business Rules

SCREEN   Job Class

Question/Issue
HRISD Load Exceptions
Business Rule Adopted

Job Class Table
If Range is 99, do not load the range, leave null

budget_position
If salary_range is 99, do not load range or step, leave null

Question/Issue
Risk Clas by Job Classificaiton
Business Rule Adopted

Build in a system tickler such as SQL E-mail notifcation to SPS Administrator to go look for new rates.

Question/Issue
School for Deaf Salary
Business Rule Adopted

Team Discussion 1/24/03
Let's go ahead an nullify the salary_range school/teacher job classes. This will for SPS to use the actual salary and make it so we don't have to try to decipher the rules. This is not issue/requirement #134. Kent, you load range from the Job Class table when loading HR data positions, correct? If so this shouldn't affect the extract, otherwise we'd have to set these to null in import.

Question/Issue
Update Salary
Business Rule Adopted

If the Job Class has a valid range associated with it, this range MUST be used for budget_position record and projection calculation. If the position indicates special pay, the special pay range of the Job Class table will be used (if available). Only records with Job Classes without a valid range will be able to overwrite the salary.

2/20/03 - Salary is saved when the budget_position record is saved (updated) Salary is assumed current on the record update date.
   Y rates will also be able to overwrite the salary.
   If Job Class has no range, but the appointment record does, ignore the appointment record range and only save the current appointment salary.

SPS Business Rules

SCREEN   Salary

Question/Issue
Comp Table
Business Rule Adopted

The salary table will not be updated until changes are in effect. An Increase screen/function will be used to apply an increase to the salaries as listed in the schedule. Once a salary schedule with a data greater than the increase date is in effect, the increase will no longer be applied. The salary schedule is considered to be the true salary at that time.

Question/Issue
Merit System for Salary
Business Rule Adopted

Per 11-20-02 Meeting
Merit_System will become a key field of the salary table
We will duplicate the salary table for each required merit system (Erik to supply list)
If available, we will be able to load salary schedules for PRT and DOT/Ferries into their respective merit systems

All salary lookups will include merit_system in the lookup.

SPS Business Rules

SCREEN   Risk Class

Question/Issue
Calculate Medical Rate
Business Rule Adopted

Need to build in some type of tickler such as a SQL e-mail message to check LNI rates each January.

Question/Issue
Risk Clas by Job Classificaiton
Business Rule Adopted

Build in a system tickler such as SQL E-mail notifcation to SPS Administrator to go look for new rates.

SPS Business Rules

SCREEN   Salary Increase

Question/Issue
Cola Adjustment
Business Rule Adopted

Must be able to enter an increase for COLA that allows for exceptions (i.e., exclude judges JC 30000 from standard COLA). Consider an option to pop up an exception list box on Increase interface.

SPS Business Rules

SCREEN   Position Console

Question/Issue
COLA Adjustment
Business Rule Adopted

10-2-02
The Salary table will always be the current table, not future. An Increase table will determine the increase to apply to these salaries until a Salary more current than the effective date.

Question/Issue
Update date of a position file
Business Rule Adopted

The update login ID and date for a budget_position_group when any record within is changed or a record is added or a record is deleted.

SPS Business Rules

SCREEN   Position Listing

Question/Issue
Exception Processing Alternative

Business Rule Adopted

11/27/02
When a user accesses a position file for viewing (in list form), verify all index codes are valid. If any index codes within the records are invalid, bring the list up filtered to only all records with invalid entries and put an obvious visual on the screen that screams "Positions within this file have invalid index coding.   These coding errors must be resolved before you can apply a filter or run a projection accurately". This filtered group should act as any other filtered position list with the abilty to update in 1 transaction, delete position records, open position records to manually make changes, etc.

2-3-03 - Also provide a filter option for invalid records on the standard filter.

2-4-03 - Are we still going to force them to fix errors before they can view the position list? Does this requirement need to change.

2/20/03 - Users will be able to establish which biennium to use for titles on each position file (budget_position_group). The lookups and exception flags will then be based on this biennium. Users will be able to change this biennium. When this change is made the exception process will run again for the file to reset invalid flags as appropriate.

The exception process will re-run for each copy/merge as well. In this case the biennium title set for the Copy To file (the file the new will utilimately reside in) is the what the exceptions will be checked against.

Question/Issue
Filter

Business Rule Adopted

Filter criteria is saved for only the current session. Filter should be set to ALL by default when accessing the system in a new session.

Question/Issue
Index code usage

Business Rule Adopted

Do not store index definitions. Looks up definitions for reporting, filter, position list, and position detail. This will require users to have indexes defined in AFRS one day in advance of use.   Always use the latest (current) biennium titles when defining indexes. Also assumes that if they want to do anything at a high level of coding, they have an index that represents that high level coding (I.e., DOC PI 20000 = Program 200)

SCREEN   Position Listing

Question/Issue
Load of AFRS Title
Business Rule Adopted

One day delay in accessing AFRS coding titles is acceptable for the first release

Question/Issue
Merit System for Salary
Business Rule Adopted

Per 11-20-02 Meeting
Merit_System will become a key field of the salary table
We will duplicate the salary table for each required merit system (Erik to supply list)
If available, we will be able to load salary schedules for PRT and DOT/Ferries into their respective merit systems

All salary lookups will include merit_system in the lookup.

Question/Issue
MTG 2.1.2
Business Rule Adopted

Copy funding detail into a new file

Question/Issue
Name Length
Business Rule Adopted

The name field in SPS will be 30 characters

Question/Issue
Position File Security
Business Rule Adopted

Warn a user when they select to view a position file (listing) that is currently in use by another user. Do not prevent changes. A dialog box upon selection in additional to an indicator in the status bar would be most desirable.

SCREEN   Position Listing

Question/Issue
Position Listing Sort

Business Rule Adopted

ONLY VALID IF WE PUT FUNDING INFORMATION ON THE POSITION LIST

When we expand the list to view funding, need a complete new line for each fund with salary prorated. Then if sorted a position with multiple funding lines is sorted, the position will show up in all spot with the prorated salary (I.e., 30% line 10, 30% line 100, 30% line 245).

Save sort selections for next session (cookie). If a user sorts a particular way it is an indication they will likely always want to view the list in this order.

Flag sort options in column heading (I.e., 1st sort denoted with (1), 2nd sort (2), etc.)

Question/Issue
Salary by position

Business Rule Adopted

THIS IS A CHANGE*****'

THIS IS A CHANGE

2/20/03 - Salary will be looked up and saved each time a position is saved. If a position was saved 5-years ago, the 5 year old salary is what will be displayed and used on the position listing report (previously stated would always lookup current.. The user will be prompted to update step and lookup new salary when they save a record - this requirement coincides with requirement #126 where we always assume the increment date is current at the the save date. In addition, need an option on the position file that says "Update position steps and salary to current". In which case we would step up the increments to current and lookup the current salary on the current salary schedule and save the new step and salary for each position.1. Also, Y rates never get COLA, increment, or 6767 adjustments.

Question/Issue
Update Displayed Records

Business Rule Adopted

List of Filter/Update in 1 Transaction fields reviewed and updated.

SPS Business Rules

SCREEN   Position Detail

Question/Issue
AFRS Title

Business Rule Adopted

The budget_position_group will have a biennium for titles available. User will be able to set this biennium by position file. When they change the biennium for titles, the exception process must re-run to validate exception records.

Biennium for titles will be saved with the projection group so that the projection reports can look up titles from the appropriate biennia. The titles biennium does not affect the projection period.

Question/Issue
Appropriation Index

Business Rule Adopted

2/20/03 - On the HR data load, we will replace the * with a 1 if the extract occurs in the first fiscal year or a 2 if the extract occurs in the 2nd fiscal year. SPS will not store * in the appropriation index.

Question/Issue
Date Identification

Business Rule Adopted

Vicki and Art met and decided that Appointment Date (HRIDS) should be used as the effective date (SPS). Hire date does not contribute to SPS. Database should only have position_start_dt, remove hire_dt. Position_start_dt is same as Effective Date. HRISD load and Position UI should reflect this using "Effective Date". This issue will be closed with database changes and design document updates.

Question/Issue
HRISD Load Exceptions

Business Rule Adopted

Job Class Table
If Range is 99, do not load the range, leave null

budget_position
If salary_range is 99, do not load range or step, leave null

SCREEN   Position Detail

Question/Issue
Increment Date

Business Rule Adopted

1. The increment date will be when they receive their next increment.

For example, if an employee is at range 50, step d, and has an increment date of 3/1/2003 - the employee will be at step E on 3/1/2003.

2. For employees who are at the last step (typically K) we will compute prior increments based on the increment date.

For example, if an employe is at range 50, step k, and has an increment date of 3/1/2002. Prior increments will only be computed for projections that are in the 2001-03 biennium.
The 3/1/2002 will be assumed to be when they received their last increment.

3. Increments are will not check update date or position start date.

Question/Issue
Index code usage

Business Rule Adopted

Do not store index definitions. Looks up definitions for reporting, filter, position list, and position detail. This will require users to have indexes defined in AFRS one day in advance of use.   Always use the latest (current) biennium titles when defining indexes. Also assumes that if they want to do anything at a high level of coding, they have an index that represents that high level coding (I.e., DOC PI 20000 = Program 200)

Question/Issue
Job Classification Structure

Business Rule Adopted

When position records are state patrol, allow overwrite of Range to any Range available to state patrol positions with that job class. A separate table in SPS is available to look up these ranages.

Validate on load, validate on entry

SCREEN   Position Detail

Question/Issue
Limit salary subobjects to valid

Business Rule Adopted

Only allow A object sub-objects and subobject NW in the funding grid. The funding grid can only have 1 subobject regardless of how many funding lines exist. Valid_salary_subobject is a lookup table for verifying valid salary sub objects. When NW is the sub object, do not calculate staff months on the projection.

From SAAM - Sub Object NW - Special Employment Compensation

The amounts expended on salaries for individuals considered employees for payroll tax reporting, but not for state staff reporting (FTE) such as; Washington Conservation Corps, Ecology Youth Corps, Voluntary Separation and Retirement Incentive Program (Financial Incentive Payments only), and supported employment groups. (OFM approval is required to use this subobject.)

Note: Do not code participants in the state internship program under this code. Refer to the Object A series as appropriate. FTEs generated for interns and executive fellows will not count as budgeted FTEs.

Question/Issue
Load of AFRS Title

Business Rule Adopted

One day delay in accessing AFRS coding titles is acceptable for the first release

Question/Issue
Master Index Handling

Business Rule Adopted

2-4-03 Vicki - If we are not storing master index, I don't think we want to flag a record invalid because of something that came from there.
According to Nancy, AFRS always uses the master index value when a field has both a master index value and an manually entered value. So if we want to be consistent to AFRS we should store:

        10001   ABCD   0011   WXYZ

and not mark as a exception. Do we want to make this the requirement? 2-7-03 Art says yes!

SCREEN   Position Detail

Question/Issue
Merit System for Salary

Business Rule Adopted

Per 11-20-02 Meeting
Merit_System will become a key field of the salary table
We will duplicate the salary table for each required merit system (Erik to supply list)
If available, we will be able to load salary schedules for PRT and DOT/Ferries into their respective merit systems

All salary lookups will include merit_system in the lookup.

Question/Issue
MTG 1.3.1

Business Rule Adopted

Build a position record with multiple employees

Question/Issue
Name Length

Business Rule Adopted

The name field in SPS will be 30 characters

Question/Issue
OASI Eligibility Flag

Business Rule Adopted

Design should allow for extract process should mark OASI as Yes by default
Design should allow for adding new position to flag OASI as Yes by default

Question/Issue
Part Time Benefits

Business Rule Adopted

Users must be allowed to flag or unflag positions for health insurance benefits to be included in projections. Flag should be flagged for including Health Insurance Benefits by default. Database has the insurance_eligibility flag available for this. Position multiplier should assume health insurance rate times the multiplier.   For release 1, only have a Yes or No insurance eligibility. There is no need to distinguish health plan at this time.

SCREEN   Position Detail

Question/Issue
Part-Time Processing

Business Rule Adopted

A position will be considered part-time when the position detail indicates a PT % of less than 100% or Variable PT data in attached to the record.

Question/Issue
Person ID Number

Business Rule Adopted

Art and Vicki met 9-20-02 and decided that Person ID never needs to be available to the user. This will be used for database purpose only. It may create the situation where one person has multiple ID's but that is okay if the user is never relying on Person ID. Currently BPS1 operates in this way with SSN in the background only.

When a user adds a new position, the system should assign a person ID as a negative integer. The assignment can be sequential by agency. The first would be -00001, the next -00002 and so on. Or backward from -99999 would be fine as well.

Question/Issue
Position Detail Screen for WMS/EMS

Business Rule Adopted

Two different flavors to the screen. One for classified positions, a second for all others. Differences are: 1) May Exceed Band available when not a classified position, 2) Review Date instead of Increment Date when not a classified position, 3) disable or hide range/step when not a classified position.

Question/Issue
Salary by position

Business Rule Adopted

THIS IS A CHANGE*****'

THIS IS A CHANGE

2/20/03 - Salary will be looked up and saved each time a position is saved. If a position was saved 5-years ago, the 5 year old salary is what will be displayed and used on the position listing report (previously stated would always lookup current.. The user will be prompted to update step and lookup new salary when they save a record - this requirement coincides with requirement #126 where we always assume the increment date is current at the the save date. In addition, need an option on the position file that says "Update position steps and salary to current". In which case we would step up the increments to current and lookup the current salary on the current salary schedule and save the new step and salary for each position.1. Also, Y rates never get COLA, increment, or 6767 adjustments.

SCREEN   Position Detail

Question/Issue
Special pay

Business Rule Adopted

The special pay code will be replaced by a flag in the database indicating if the special pay range should be used or not. On the data load this flag will be set to 'Y' if the special pay code equals either AP or DL, and the appointment's salary_range is greater than the salary range for the job class. All other records will be set to 'N'.

Question/Issue
Update Salary

Business Rule Adopted

If the Job Class has a valid range associated with it, this range MUST be used for budget_position record and projection calculation. If the position indicates special pay, the special pay range of the Job Class table will be used (if available). Only records with Job Classes without a valid range will be able to overwrite the salary.

2/20/03 - Salary is saved when the budget_position record is saved (updated) Salary is assumed current on the record update date.
 Y rates will also be able to overwrite the salary.
 If Job Class has no range, but the appointment record does, ignore the appointment record range and only save the current appointment salary.

Question/Issue
WMS Override Band Flag

Business Rule Adopted

A separate over_ride flag will be available for all WMS and exempt positions.

SPS Business Rules

SCREEN   Projection Console

Question/Issue
Basis for increments
Business Rule Adopted

1) The budget_position.update_dt will be used to determine the number of increments to apply when projecting salaries.
2) The budget_position.update_dt equals the last date record was updated/saved or extract_dt if no updates/saves have been applies to the record.
3)

Question/Issue
Cola Adjustment
Business Rule Adopted

Must be able to enter an increase for COLA that allows for exceptions (i.e., exclude judges JC 30000 from standard COLA). Consider an option to pop up an exception list box on Increase interface.

Question/Issue
Comp Table
Business Rule Adopted

The salary table will not be updated until changes are in effect. An Increase screen/function will be used to apply an increase to the salaries as listed in the schedule. Once a salary schedule with a data greater than the increase date is in effect, the increase will no longer be applied. The salary schedule is considered to be the true salary at that time.

Question/Issue
How are vacant positions projected
Business Rule Adopted

A position without a step or salary is assumed vacant and will not be included in any projections.

Question/Issue
Incremental Projections
Business Rule Adopted

Projections should be stored incrementally. This means that a base salary would stay the same for all 24 months of the projection. A step would display changes by month. The two together would calculate the total salary. Vicki has a spreadsheet that details this concept.

SCREEN   Projection Console

Question/Issue
Merit System for Salary
Business Rule Adopted

Per 11-20-02 Meeting
Merit_System will become a key field of the salary table
We will duplicate the salary table for each required merit system (Erik to supply list)
If available, we will be able to load salary schedules for PRT and DOT/Ferries into their respective merit systems

All salary lookups will include merit_system in the lookup.

Question/Issue
Overtime Sub Object
Business Rule Adopted

Any dollars calculated as a result of overtime entry or percentage should be projected as sub object AU.

Question/Issue
Projection Adjustments
Business Rule Adopted

Rates Conceptual Vision/Design available with rules/requirements as discussed by the team

SCREEN   Projection Console

Question/Issue
Projection Detail Level

Business Rule Adopted

Staff Month   0 1 1 1 1 1 1 1 1 1 1 1 1 1

Salary   AA 1 2000.00 2000.00 2000.00 2000.00 2000.00 2000.00 2000.00 2000.00 2000.00 2000.00 2000.00 2000.00 2000.00 24000.00

Salary
Increment   2   50.00 50.00 50.00 50.00 50.00 50.00 50.00 50.00 50.00 50.00 50.00 50.00 600.00

BASE = June 30th of the previous biennum or first month of data available if no previous month exists

     Calculation
Staff Month   E3
AA - 1 - Salary   E4   Sfaff month * Salary (E4)
2 - Salary Increment   E5
3 - COLA   E6
4 - 6767   E7
BA - 1 - OASI   E8   OASI rate * Salary (E4)
2 - Salary Increment   E9   OASI rate * Salary Increment (E5)
3 - COLA   E10   OASI rate * COLA (E6)
4 - 6767   E11   OASI rate * 6767 (E7)
BB - 1 - Retirement   E12   Retirement rate * Salary (E4)
2 - Salary Increment   E13   Retirement rate * Salary Increment (E5)
3 - COLA   E14   Retirement rate * COLA (E6)
4 - 6767   E15   Retirement rate * 6767 (E7)
BC - 1 - Medical   E16
BD - 1 - Health Care   E17   Health Care cost
BH - 1 - Medicare   E18   Medicare rate * Salary (E4)
2 - Salary Increment   E19   Medicare rate * Salary Increment (E5)
3 - COLA   E20   Medicare rate * COLA (E6)
4 - 6767   E21   Medicare rate * 6767 (E7)

projection step
0 Staff Month
1 Object level
2 Salary Increment
3 COLA
4 6767

Question/Issue
Staff Mo as projection Element

Business Rule Adopted

Staff month is needed by month in the projection. The staff month is calculated with the Multiplier * PT or OT.

Position with multiplier of 1 and PT at 80% would have 24 months of .8 staff months. If variable PT screen is used, the staff month would vary by this amount.

SCREEN   Projection Console

Question/Issue
Update Salary

Business Rule Adopted

If the Job Class has a valid range associated with it, this range MUST be used for budget_position record and projection calculation. If the position indicates special pay, the special pay range of the Job Class table will be used (if available). Only records with Job Classes without a valid range will be able to overwrite the salary.

2/20/03 - Salary is saved when the budget_position record is saved (updated) Salary is assumed current on the record update date.

      Y rates will also be able to overwrite the salary.

      If Job Class has no range, but the appointment record does, ignore the appointment record range and only save the current appointment salary.

SPS Business Rules

SCREEN   Standard Parameter Selections

Question/Issue
Salary by position
Business Rule Adopted

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SPS Business Rules

SCREEN   Projection

Question/Issue
How are vacant positions projected

Business Rule Adopted

A position without a step or salary is assumed vacant and will not be included in any projections.

Question/Issue
Limit salary subobjects to valid

Business Rule Adopted

Only allow A object sub-objects and subobject NW in the funding grid. The funding grid can only have 1 subobject regardless of how many funding lines exist. Valid_salary_subobject is a lookup table for verifying valid salary sub objects. When NW is the sub object, do not calculate staff months on the projection.

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Note: Do not code participants in the state internship program under this code. Refer to the Object A series as appropriate. FTEs generated for interns and executive fellows will not count as budgeted FTEs.

Question/Issue
Overtime Sub Object

Business Rule Adopted

Any dollars calculated as a result of overtime entry or percentage should be projected as sub object AU.

SPS Business Rules

SCREEN   Projection Detail

Question/Issue
AFRS Title
Business Rule Adopted

The budget_position_group will have a biennium for titles available. User will be able to set this biennium by position file. When they change the biennium for titles, the exception process must re-run to validate exception records.

Biennium for titles will be saved with the projection group so that the projection reports can look up titles from the appropriate biennia. The titles biennium does not affect the projection period.

Question/Issue
Appropriation Index
Business Rule Adopted

2/20/03 - On the HR data load, we will replace the * with a 1 if the extract occurs in the first fiscal year or a 2 if the extract occurs in the 2nd fiscal year. SPS will not store * in the appropriation index.

Question/Issue
MTG 1.3.10
Business Rule Adopted

Enter a specific date when the position event is to take place. Salary calculations should prorate down to that date.

Question/Issue
MTG 4.2.1
Business Rule Adopted

Specify whether they want to include COLA in the projection run

Question/Issue
MTG 4.2.2
Business Rule Adopted

Specify the fiscal period for the projection run (I.e., CB, EB, and Bow-wave)

SCREEN   Projection Detail

Question/Issue
MTG 5.1.2

Business Rule Adopted

The projection will include all salary adjustments specified in the scenario file and all position adjustments identified in the positio information file

Question/Issue
Part Time Benefits

Business Rule Adopted

Users must be allowed to flag or unflag positions for health insurance benefits to be included in projections. Flag should be flagged for including Health Insurance Benefits by default. Database has the insurance_eligibility flag available for this. Position multiplier should assume health insurance rate times the multiplier.   For release 1, only have a Yes or No insurance eligibility. There is no need to distinguish health plan at this time.

Question/Issue
SubObject NW

Business Rule Adopted

If subobject in the funding grid is NW, do not calculate benefits or staff months for the position. These positions are "special" employees; an agreement where we can hire disadvantaged workers and not be charged staff months (FTEs) or benefits.

From SAAM - Object NW
Special Employment Compensation

The amounts expended on salaries for individuals considered employees for payroll tax reporting, but not for state staff reporting (FTE) such as; Washington Conservation Corps, Ecology Youth Corps, Voluntary Separation and Retirement Incentive Program (Financial Incentive Payments only), and supported employment groups. (OFM approval is required to use this subobject.)

Note: Do not code participants in the state internship program under this code. Refer to the Object A series as appropriate. FTEs generated for interns and executive fellows will not count as budgeted FTEs.

SPS Business Rules

SCREEN   Reporting

Question/Issue
AFRS Title

Business Rule Adopted

The budget_position_group will have a biennium for titles available. User will be able to set this biennium by position file. When they change the biennium for titles, the exception process must re-run to validate exception records.

Biennium for titles will be saved with the projection group so that the projection reports can look up titles from the appropriate biennia. The titles biennium does not affect the projection period.

Question/Issue
Appropriation Index

Business Rule Adopted

2/20/03 - On the HR data load, we will replace the * with a 1 if the extract occurs in the first fiscal year or a 2 if the extract occurs in the 2nd fiscal year. SPS will not store * in the appropriation index.

Question/Issue
Index code usage

Business Rule Adopted

Do not store index definitions. Looks up definitions for reporting, filter, position list, and position detail. This will require users to have indexes defined in AFRS one day in advance of use.   Always use the latest (current) biennium titles when defining indexes. Also assumes that if they want to do anything at a high level of coding, they have an index that represents that high level coding (I.e., DOC PI 20000 = Program 200)

Question/Issue
Load of AFRS Title

Business Rule Adopted

One day delay in accessing AFRS coding titles is acceptable for the first release

SPS Business Rules

SCREEN   Allotment Reports

Question/Issue
AI on Allotment Reports
Business Rule Adopted

Group the report based on Fund-AT with a break for a new group when the first two characters of the AI is different.   So if one person was coded:

| 50% | 101/102 | 001-1 |
| 50% | 6P1/6P2 | 001-1 |

They would have one set (both fiscal years) for the 001-1 10* appropriation and a separate set (both fiscal years) for the 6P* appropriation.

SPS Business Rules

SCREEN   Position Listing Report

Question/Issue
Salary by position
Business Rule Adopted

THIS IS A CHANGE*****'

THIS IS A CHANGE

2/20/03 - Salary will be looked up and saved each time a position is saved. If a position was saved 5-years ago, the 5 year old salary is what will be displayed and used on the position listing report (previously stated would always lookup current.. The user will be prompted to update step and lookup new salary when they save a record - this requirement coincides with requirement #126 where we always assume the increment date is current at the the save date. In addition, need an option on the position file that says "Update position steps and salary to current". In which case we would step up the increments to current and lookup the current salary on the current salary schedule and save the new step and salary for each position.1. Also, Y rates never get COLA, increment, or 6767 adjustments.